Jason Knox, AIF®, CRC®

Financial Representative

My goal is to help you make the most informed decisions for you, your family, your business and your lifetime financial goals.

We take the time to learn about your current situation, goals, and visions for your financial future. Our team is dedicated to finding Solutions that are objective, uniquely designed for your situation, efficient from both economic and tax perspectives, and are well positioned for future changes in your needs or objectives.

We believe that knowledge and experience, coupled with innovative technology, allows us to develop, integrate, and apply the best Solutions for each client. Our comprehensive and collaborative Look Forward! process helps ensure your financial visions today become your future financial realities.

We live by our core values: honesty, integrity, respect, diversity, cooperation and a commitment to succeed—and incorporate them into everything we do.

Whether you are experienced in the financial world, or just getting started, we Look Forward! to the Journey with you.

"I want to play a central role in helping you achieve your life goals."

I understand the important role a financial representative plays in helping individuals and families achieve their life goals. As your professional partner, I can provide:

• Lifetime Needs Analysis
I develop long-term working relationships with clients, providing financial solutions as they progress through their careers on into retirement. My strategy is to work from the clients' side of the table - looking at the concerns of the client and addressing their needs as if they were my own. I provide retirement income projections and financial education to help you maximize your benefits and maintain flexibility.

• Personalized Strategies and Solutions Designed to Help Achieve Your Financial Goals
I take pride in listening to my clients and helping them achieve their individual goals such as building a retirement nest egg, or a more comprehensive plan with several goals such as college funding or protecting against the loss of a loved one. I will be there to help. The Honorable Learned Hand, US Appeals Court Justice, once said, "There are two systems of taxation in our country: one for the informed and one for the uninformed." I want to assist you in becoming one of the informed.

• Objective Investment and Risk Management Advice
This client-centered approach to investment planning can help you assemble a diversified portfolio* including insurance and risk management strategies designed to help meet your unique needs.

- Personalized Financial Planning
- Retirement Planning
  - — 403(b), 457(b) and 401(k) Plans
  - — Roth IRA, Traditional IRA
  - — SIMPLE IRA, SEP IRA, 401(k)
  - — Lump Sum Rollovers
- Investments
  - — Mutual Funds
  - — Annuities (fixed and variable)
- Customized Retirement Counseling
- Education Planning
  - — 529 College Savings Plan
  - — Coverdell Education Savings Account
  - — UGMA/UTMA
- Insurance
  - — Life
- Asset Management Services

About Lincoln Investment
With 50 years of industry leadership and specialized expertise in investment strategies, the Lincoln Investment Companies, as broker/dealer and registered investment adviser, along with Capital Analysts and Legend Advisory, registered investment advisers, have enabled financial advisors to provide their clients with a lifetime of financial services. We work through over 1,100 independent financial advisors located in more than 400 branch offices in 43 states. Our advisors serve the diverse and changing financial needs of more than 320,000 individual investors representing over $32 billion in assets.

To learn more about how I can help you achieve your financial goals call 1-877-566-9468or 563-422-8824 or email jknox@knoxfin.com. Please visit our website at www.lincolninvestment.com.

** There is no assurance that a diversified portfolio will produce better returns than an undiversified portfolio, nor does diversification assure against market loss.*

Knox Financial Services, LLC • 122 Winnebago Street • Decorah, IA 52101 • 1-877-566-9468 •

LINCOLN INVESTMENT

14540: 10/14/10